



AAD Event Lead Online Event Planning Check-List

Use this guide to help bring your online event from concept to completion.

- Bold titles are considered essential steps/non-negotiables in planning your event
 - Timelines are broad pre-event, based on ideals and best-practices from planners
 - Associated actions/actions to consider are best-practices from planners across the division; while recommended, some are only applicable to specific colleges, units, or program areas
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Establish Concept/Vision/Goals/Partnerships including DEI (-8-12 weeks)

- Associated actions / actions to consider:
 - Discussions with potential program partners for cross-collaboration (i.e. College & Units, Central AA&D, other University departments)
 - Need for event could be triggered by the pipeline with identification, cultivation, solicitation, stewardship of a volunteer or donor
 - Review events calendar and email calendar in preparation to pick a date/time frame to avoid conflicts OR identify similar programs for collaboration
 - Reference DEI Planning Questions and Checklist doc throughout process
(<https://docs.google.com/document/d/1JXqf-cn055Wwj971jDqQF0JN7X7EVKa-iBMnLeM5nyg/edit>)

Submit to AAD Events and Email Calendar (-6-12 weeks)

- Associated actions / actions to consider:
 - **For the Events Calendar** (<https://www.aad.cornell.edu/events-calendar/>)
 - Check if there are overlapping events, conflicts, or opportunities for collaboration
 - Always submit your event to the Events Calendar
(<https://airtable.com/shrlq73kY3tSsBeDW>)
 - Cross-check with email calendar to see how you can pick the best date based on your attendance/audience goals (i.e. do you want your event to reach all-alumni? If so, will the date coordinate with a Tuesday newsletter for broader marketing?)
 - Add tentative dates if you are waiting for confirmation and/or deciding between multiple dates
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin
 - **For the Email Calendar** (<https://www.aad.cornell.edu/email-calendar/>):
 - Even if not using iModules, you need to submit email plan to the calendar
(<https://www.aad.cornell.edu/email-request/>)
 - Timing may be based on what else is on the calendar / surrounded by the date
 - College & Units don't always work through email marketing team as they manage on their own or have in-house mkt/comm assistance
 - Volunteer-driven: some marketing done internally and a small amount external (may be added by AA&D staff rep)
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin



- **Determine Support needs: Central Marketing and Participation / Digital Engagement team, C&U Marketing & Communications, Events Management, External Resources, etc. (-10 weeks)**
 - Associated actions / actions to consider:
 - Extra support is determined on a case by case basis and teams may ask:
 - Does this event fit in to central marketing themes or fill gaps for certain programming needs?
 - Is the content relevant enough to amplify to all-alumni?
 - What is the audience reach?
 - The type of event (i.e. flagship/signature events, volunteer-driven, all-alumni, class-driven, etc.)
 - Internal Support Requests:
 - CMP: Live Stream Request Form: <https://airtable.com/shrEPJdVHS32bxwst>
 - Events Management Request Form: <https://app.smartsheet.com/b/form/a4d6e04b82b94695a78e1e143c9eb1a2>
 - **Assigned to:** Event Lead

- **Determine Marketing Plan (-4-6 weeks)**
 - Associated actions / actions to consider:
 - Your communications plan: Plan out marketing schedule based on event date, best practices, and central email calendar
 - Submit all emails to Email Calendar
 - Save the dates
 - Registration Live/Invitation Info
 - Thank you/Surveys
 - Plan out a Social media schedule and consult with social media leads
 - **Assigned to:** Event Lead

- **Speaker Recruitment (-4-10 weeks)**
 - Associated actions / actions to consider:
 - Research potential speakers
 - Consult DEI guide for speaker composition considerations
 - Follow required processes:
 - Faculty requests (<http://blogs.cornell.edu/facultyengagement/>)
 - IGO/EO outreach ahead of event
 - Look for co-sponsorship opportunities
 - Begin draft briefings (include a program at-a-glance)
 - Schedule and hold introductory speaker call
 - **Assigned to:** Event Lead

- **Establish Tech Info/Platforms/Online Venues (-4-9 weeks)**
 - Associated actions / actions to consider:



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- Determine your tech platform (i.e. Microsoft Teams, Zoom, Facebook Live. Google etc.)
 - Understand what type of "venue" will work best for your program and your audience
 - For Zoom:
 - Determine audience number and request increased licenses from IT, if needed (<https://it.cornell.edu/zoom/request-large-meeting-webinar-or-premium-audio-zoom>)
 - Depending on your program, determine whether Meeting or Webinar will work best (<https://support.zoom.us/hc/en-us/articles/115005474943-Meeting-and-webinar-comparison>)
 - Set up registration platform, if taking registrations (i.e. Zoom, iModules, but note that some online all-alumni events do not require registration)
 - Make sure platform and venue have accessibility options or can work with systems like Recap'd
 - Note: Not every group uses Zoom, but most AAD events are currently through Zoom
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin
- **Finalize Briefing/Event Details/ROS (-7 days-3 weeks)**
- Associated actions / actions to consider:
 - Write event briefing/run-of-show to layout your event actions (resources available for examples)
 - Share the attendance list (in required formats based on your program area/level of the event) with invested partners
 - Write and share talking points with speakers
 - Write and share program summary and objectives with involved partners
 - **Assigned to:** Event Lead
- **Hold Rehearsal/Dry Run (-4 days-2 weeks)**
- Associated actions / actions to consider:
 - Include key participants (speakers, staff, IT/Tech lead)
 - If speakers are unavailable, hold a separate run-through with any involved staff
 - At minimum, hold run-through 30 minutes ahead of the program on the event day
 - **Assigned to:** Event Lead
- **Send Internal Communications about event: IGOs, EOs, AAD (-3-7 days)**
- Associated suggested actions / actions to consider:
 - Send a PA_Official announcing the event, and include relevant information such as: marketing copy, # of registrants, registration list (if available), a request to share, etc.
 - Send attending IGOs briefing and registrant list
 - Send IGOs and EGOs a "your prospect/volunteer is attending this event" email
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin or other appropriate partner



- **Send Attendee/Speaker Reminder emails (-1-4 days)**
 - Associated suggested actions / actions to consider:
 - Attendee reminders:
 - If you used Zoom as your registration platform: automate a Zoom reminder email
 - Automated reminders can be sent 1 week, 1 day, and 1 hour before
 - If you used iModules as your registration platform: send an iModules reminder email to attendees
 - Consider including instructions for event interaction in your reminder emails
 - Panelist reminders:
 - Send panelists their personalized Zoom Webinar link
 - Include in calendar invitation to the event
 - Re-send the morning of the event so it's at the top of their inbox
 - Send all finalized briefings/cue sheets/scripts etc.
 - Confirm all releases are signed and returned
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin or appropriate partner

- **Hold Practice Session/Green Room/Pre-Event Gathering (0 days)**
 - Associated actions / actions to consider:
 - Hold a practice session and final run-through ~30 minutes before the event begins
 - All speakers must be present for the pre-event practice session
 - Have all final slides/assets for this session
 - Review and confirm all technology:
 - Test sound
 - Test lighting
 - Test presentations
 - Test other transitions/cues/assets
 - Test chat, Q&A, interactive features
 - Test closed captioning
 - Event lead leads briefing/run-through
 - Review timeline with speakers
 - Review cues with speakers
 - Confirm all staffing roles
 - **Assigned to:** Event Lead and Tech Lead

- **EVENT (0 days)**

- **POST: Send Thank You email to Speakers (+1 day)**
 - Associated actions / actions to consider:
 - Consider prepping your thank you email ahead of the event for quicker turn-around. Edit based on how the event went.



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- Send a thank you email to speakers:
 - Sender will vary based on the event scope and specific College and Unit practices (i.e. could come from a Dean)
 - Include a survey about the speakers' experiences:
<http://blogs.cornell.edu/facultyengagement/post-event-surveys-for-attendees-and-speakers/>
 - Include event feedback from attendees if possible
- **Assigned to:** Event Lead or appropriate partner

- **POST: Send Thank You email to Guests/Attendees/Registrants (+1 day)**
 - Associated actions / actions to consider:
 - Send a thank you email to attendees
 - Include event survey
 - May include recording of event
 - May include giving link
 - Re-direct survey to a landing page with additional information to the keep the thank you email short and simple
 - Send a separate "sorry we missed you!" email to registered no-shows (or all college alumni) with event recording
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin

- **POST: Coding/Uploads of Participants (+2-5 days)**
 - Coding attendees/speakers is required
 - Follow the AAD process for event attendance actions and uploads into PeopleSoft (mass action form; individual uploads, etc.)
 - *Best practice is to upload all attendance and speaker actions within 5 business days of event*
 - See page for more information: <http://blogs.cornell.edu/aadengagement/tutorials/>
 - Upload speaker actions into PeopleSoft
 - **Assigned to:** Event Lead OR Event Lead assigns to Event Support/Program Admin

- **POST: Follow Up/Share Post-Event Update (+4-7 days)**
 - Associated actions / actions to consider:
 - Complete any post-event reports and/or write-ups based on your program area best practices and expectations
 - Share data, event results with event partners and appropriate AAD stakeholders
 - Share topline survey results with speakers
 - Share event and speaker feedback with EO/IGO if needed
 - Ongoing - track updates about speakers (i.e. books, articles, news) and share with attendees
 - Research attendees for discovery
 - **Assigned to:** Event Lead



- **POST: Hold internal debrief meeting (+7-14 days)**
 - Associated actions / actions to consider:
 - Collect feedback and share survey results with participants ahead of debrief meeting
 - Hold a debrief meeting with event team to determine if goals and objectives were met and discuss feedback
 - Share results and debrief with your larger team/department
 - If applicable, complete feedback survey for Dean
 - **Assigned to:** Event Lead